

STATEMENT OF WORK

NATIONAL INSTITUTE OF ARTHRITIS AND MUSCULOSKELETAL AND SKIN DISEASES INFORMATION CLEARINGHOUSE AND RELATED SUPPORT SERVICES

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1. Introduction/Background

1.1 National Institute of Arthritis and Musculoskeletal and Skin Diseases (NIAMS)

The National Institute of Arthritis and Musculoskeletal and Skin Diseases (NIAMS) supports basic, clinical, and epidemiologic research, research training, and information programs on many of the more debilitating diseases affecting the American people. Most of these diseases are chronic and many cause life-long pain, disability, or disfigurement. They afflict millions of Americans, cause tremendous human suffering, and cost the United States economy billions of dollars in health care and lost productivity. These diseases include the many different forms of arthritis and numerous diseases of the musculoskeletal system and the skin. The Institute also conducts and supports research on the normal structure and function of joints, muscles, bones, and skin.

The NIAMS is committed to a comprehensive program of information dissemination to patients and to their health care providers. Research advances are of limited value if they never reach the arena of health care, and they miss the goal of improving public health for all Americans. The NIAMS supports three major prongs of information dissemination: (1) the Institute's Office of Communications and Public Liaison (OCPL) in the Office of the Director, (2) the NIH Osteoporosis and Related Bone Diseases ~ National Resource Center, and (3) the National Institute of Arthritis and Musculoskeletal and Skin Diseases Information Clearinghouse.

A team including key staff members and a subcommittee of our Advisory Council help the NIAMS plan its information-dissemination strategy. In addition, the NIAMS works closely with many voluntary and professional societies to learn their needs and disseminate our research findings to them. The NIAMS also has targeted its information to particular areas of need, such as underserved, disadvantaged and non-English-speaking communities, and it strives to make its information accessible to the vast and diverse populations affected by the diseases within its mandate.

1.2 NIAMS Information Clearinghouse

The earliest predecessor to the current NIAMS Information Clearinghouse was the Arthritis Information Clearinghouse, which was created in 1978 in response to a congressional mandate to identify, collect, process, and disseminate print and audiovisual educational materials concerned with arthritis and related musculoskeletal diseases. In 1985, the Health Research Extension Act (P.L. 99-158) established the NIAMS, whose purpose is "the conduct and support of research and training, the dissemination of health information [emphasis added], and other programs with respect to arthritis and musculoskeletal and skin diseases, including sports-related disorders." The Act also states that the Director of the Institute is to establish an Information Clearinghouse "to facilitate and enhance through the effective dissemination of information, knowledge and understanding of arthritis and musculoskeletal and skin diseases by health professionals, patients and the public." The Contractor shall have a variety of responsibilities in support of these mandates.

Since its inception in 1978, the Clearinghouse effort has been funded by contracts. When the contract was recompeted in 1987, the scope was expanded from arthritis to incorporate musculoskeletal and skin diseases as called for in P.L. 99-158. The 1990 contract award added more capacity to assist with education planning, particularly for special efforts in lupus, and to support the Office of Scientific and Health Communications (now called the OCPL). The 1994 contract award reflected an emphasis on more effective response to public inquiries, creation of new materials for the public, improving public access to information, researching consumer interests and needs, and fulfilling initiatives in lupus.

The 1998 award for the NIAMS (or “Clearinghouse”) contract included such emphases as:

- enhancing information services,
- adding more support for electronic resources,
- expanding writing capabilities,
- continuing to build the database of health education materials,
- seeking more active communication and collaboration with other related health organizations,
- continuing use of consumer research results, and
- continuing outreach to promote the Clearinghouse’s services and materials.

A toll-free telephone inquiry line also was added.

1.3 NIAMS Need

The NIAMS is seeking an organization to operate the Clearinghouse and to provide related information dissemination services to the NIAMS Office of Communications and Public Liaison, including:

- 1) Inquiry response and related services
- 2) Materials development
- 3) Materials management
- 4) Database support
- 5) Interactive information systems support services
- 6) Communications research
- 7) Outreach and promotion services
- 8) Event support
- 9) Patient liaison services

1.4 Contract Goals

A. The following are the goals of the contract:

- 1) Provide high-quality written, oral, and electronic responses to inquiries and information about arthritis, musculoskeletal, and skin diseases to a variety of audiences.
- 2) Maintain and supplement reference databases and mailing lists.
- 3) Develop and revise NIAMS materials, including publications, fact sheets, information packets, articles, press releases, and visual aids, in different formats, languages, and language levels. Store, distribute, and track these materials.
- 4) Increase public and professional awareness of NIAMS initiatives.
- 5) Support the NIAMS outreach efforts by coordinating NIAMS participation in exhibit events.
- 6) Interact with NIAMS voluntary and professional constituent-organizations, tracking their activities and needs.
- 7) Recruit and supervise the NIAMS Community Health Center patient liaison personnel; schedule and coordinate their activities.
- 8) Plan and manage project processes such as staffing, scheduling, reporting, and cost control.
- 9) Transition smoothly at both start and end of the contract.

B. Features of the next Clearinghouse award include support for the NIAMS Community Health Center, increased emphasis on bilingual and Spanish publications, and increased outreach through such mechanisms as the Federal Consumer Information Center and the North American Precip Syndicate.

2. Scope

2.1 Types of Services

Services provided under this contract shall include:

- 1) Project management
- 2) Inquiry response
 - a. Oral and written health communications
 - b. Teletypewriter/telecommunication for the deaf (TTY)
 - c. Automated computerized/electronic response

- d. Telephonic response
 - e. Written correspondence
- 3) Warehousing
 - a. Storage
 - b. Receipt
 - c. Distribution and special mailings
- 4) Inventory management
- 5) Data management and reporting
- 6) Materials development – English and bilingual
 - a. Research
 - b. Writing
 - c. Editing
 - d. Pretesting
 - e. Updating/revising
 - f. Design (for print and Web versions)
 - g. Formatting (for print and Web versions)
 - h. Management of printing
 - i. Printing
 - j. Production/reproduction
 - k. Promotion (of print and Web versions)
 - l. Electronic dissemination via NIAMS Web site
- 7) Database development and maintenance
 - a. Database software management and administration
 - b. Data identification, acquisition, and screening
 - c. Data records abstracting and indexing
 - d. Mailing list establishment, updating, and maintenance
 - e. Database searching and related customer services
- 8) Communications research and evaluation
 - a. Tracking and reporting Web site use
 - b. Tracking and reporting user feedback about print and Web materials
 - c. Analyzing communications research for materials development
- 9) Outreach and promotion
 - a. Event promotion, planning, execution, and monitoring
 - b. Patient Liaison Program
 - c. Exhibit support
- 10) Event support
 - a. Pre-event planning, preparation, and coordination
 - b. Event staffing
 - c. Audiovisual (AV) support
 - d. Documentation (minutes/notes)
 - e. Postevent analysis and reporting
- 11) Graphic arts support
 - a. Design, illustration, typography, layout, and production for print and Web
- 12) Duplication and printing
- 13) Cost recovery
- 14) Transition plan and contract closeout

15) Reports

2.2 Resources

2.2.1 Contractor-Furnished Resources

The Contractor shall provide and maintain staff, facilities, materials, and equipment necessary to perform the requirements of this contract. Contractor staff and facilities shall be within a 1-hour, roundtrip driving distance from the NIAMS for effective and efficient operations, close consultation with the Project Officer, and timeliness in carrying out the tasks of the contract. The Contractor shall have sufficient computer resources to support the requirements of this contract, to ensure compatibility with NIAMS Information Technology (IT) configurations, and to operate existing Clearinghouse databases. Specifications for these systems are as follows:

- 1) The NIAMS utilizes the Windows 2000 operating system.
- 2) The Combined Health Information Database (CHID) interfaces with BRS NetAnswer for compatibility with the World Wide Web.
- 3) A dedicated e-mail address for exclusive use under the contract at which NIAMS consumers can reach the Clearinghouse with their inquiries. E-mail and Internet access for Contractor staff, with all e-mail addresses being within a unique domain. Sufficient phone lines and a voice-messaging system as required for inquiry response. E-mail connectivity between OCPL and all Contractor staff shall be established within 5 working days of contract award.
- 4) Conference facilities for 15 people. The conference facilities must accommodate Internet access for online demonstrations and include a slide projector, a laptop computer, a high-speed modem, a projection system for the laptop, an overhead projector, and a projection screen. Conference facilities must be within a 1-hour, roundtrip commuting distance of the NIH campus (Rockville Pike, Bethesda, MD 20892).
- 5) Dedicated telephone lines for operating the toll-free call system.

[NOTE TO OFFERORS: It is estimated that conference facilities will be utilized, at a minimum, on a biweekly basis for meetings between OCPL and Contractor staff.]

2.2.2 Government-Furnished Resources

The Government shall provide the following:

- 1) Coalition database file formats currently existent in the NIAMS;
- 2) TTY Super Print Telecommunications Device for the Deaf (Ultra Tec);
- 3) Tabletop and stand-alone exhibits for use at symposiums and conferences;
- 4) Existing inventory of current and archived NIAMS materials, including camera-ready and electronic copies of publications and graphics; and
- 5) NIAMS envelopes and stationery to be used by the Contractor for mailing materials and publications requested by the public.

[NOTE TO OFFERORS: All publications and other inquiry response materials to be mailed by the Clearinghouse shall be brought to the NIH mail facility for the application of postage.]

2.3 Location of Performance

- A. Event support will be required within the Washington metropolitan area.
- B. Outreach and promotion efforts outlined in this Statement of Work may require travel by Contractor staff to deliver, set up, and dismantle NIAMS exhibits.
- C. Patient liaison services will be performed at the NIH campus and medical facilities in the Washington metropolitan area. Shuttle services operated by the NIAMS between the NIAMS Community Health Center and the NIH Clinical Center will be provided free of charge to the patient.
- D. It is anticipated that contract efforts not described above will be performed at the Contractor-provided facility.

2.4 Business Hours

- A. The NIAMS Clearinghouse hours of operation are from 8:30 AM to 5:00 PM, Eastern Standard Time, Monday through Friday.
- B. The NIAMS Clearinghouse toll-free line is accessible 24 hours a day, 365 days per year.
- C. The NIAMS Web site is accessible 24 hours a day, 365 days per year.
- D. The hours required for the patient liaison services will vary. However, the Contractor should be prepared to provide services from 9:00 AM to 5:00 PM, Monday through Friday.
- E. The normal office hours of the OCPL are from 7:30 AM to 5:30 PM, Eastern Standard Time, Monday through Friday.

F. Events sponsored by the NIAMS will usually be conducted between 7:30 AM and 5:30 PM.

[NOTE TO OFFEROR: It is anticipated that events requiring support identified in this Statement of Work usually will be held within the normal operating hours of the OCPL. However, the Contractor should be prepared to provide support outside of the normal operating hours of the OCPL once per year.]

2.5 Monitoring of Contractor Performance

The NIAMS Project Officer (PO), whose position is described in Section G, shall monitor all work under the contract.

3. Applicable Documents

The following Web links to NIAMS documents are provided as supplemental information about NIAMS programs, policies, services, and materials described in this Statement of Work:

- 1) [NIH Manual Chapter 6308, Acquisition of Printing Requirements at the NIH](#)
- 2) [NIH Manual Chapter 1183, Publications](#)
- 3) [NIH Manual Issuance 1301, Conduct of Persons and Traffic at NIH](#)
- 4) [NIH Patient Liaison Program Handbook](#)
- 5) [World Wide Web NIH Guidance](#)
- 6) [Electronic and Information Technology Accessibility Standards](#)
- 7) [Pictures of NIAMS Exhibits](#)
- 8) [Sample graphic layouts of current NIAMS publications](#)
- 9) [Sample reports as required by the Statement of Work](#)
- 10) [Current inventory of the NIAMS Information Clearinghouse publications on-hand](#)

4. Service/Work Areas/Performance Requirements

A. Performance requirements in this contract will contain three elements: (1) a performance objective, (2) performance measures, and (3) performance standards. These elements are defined below. In each case, when taken together, these elements constitute a performance requirement.

- 1) Performance Objective - A statement of the outcome or results expected in a specific services/work area. (These objectives will be identified in the basic contract for each service area.)
- 2) Performance Measures - The critical few characteristics or aspects of achieving the objective that will be monitored by the Government; those things that the Government will be gathering data about. Each objective may have one or more measures.
- 3) Performance Standards - The targeted level or range of levels of performance for each performance measure.

B. Attached is a Performance Assurance Matrix that will be used to evaluate the Contractor's performance. (The performance objective is stated at the beginning of each subtask; performance measures and standards are expressed in table format at the end of each subtask.)

4.1 General Requirements -- Cost Control Management

Performance Objective No. 4.1 *The Contractor shall develop, implement, and maintain an effective cost control and management process. This process shall include planning, identification, evaluation, execution, and assessment of methods to control costs incurred in the performance of this contract. The overall goal of this objective is to ensure quality performance of all requirements of this contract within or below the initial cost estimates for these efforts.*

| <u>Performance Measure</u> | <u>Performance Standard</u> |
|--|---|
| a) Cost estimates are reasonable and accurate. | a) Actual costs do not exceed 10% of initial cost estimates projected and provided by the Contractor. Excessively low actual costs (greater than 10% below estimates) will be closely reviewed to determine if estimates were reasonable and accurate. |
| b) Cost drivers are identified and management plans and processes are developed to ensure high risk/value cost drivers are aggressively managed. | b) Contractor identifies cost drivers on an ongoing basis and provides proactive approaches to ensure adequate management control on an ongoing basis. Contractor discusses these cost drivers and proactive approaches with the Project Officer and provides additional recommendations for Government initiatives or actions that will assist in controlling costs. |

4.2 Service Area -- Project Management, Planning, and Interface

Performance Objective No. 4.2 *The Contractor shall develop, implement, and maintain an effective project management and planning process. This process shall provide the Contractor sufficient information and data to apprise the Government on progress toward the General Objectives identified in Paragraphs 4.2.1 through 4.2.3. The project management and planning process shall include, but is not limited to, coverage of technical operation and data content of the NIAMS Information Clearinghouse and related services including staffing, schedule establishment and adherence, and overall cost control.*

4.2.1 Communications

A. In order to perform and support all services delineated within the Statement of Work, the Contractor shall be expected to be in contact with the Project Officer almost daily via e-mail, the phone and/or the facsimile machine, and regularly via meetings. Meetings are anticipated weekly for the first 2 months and, thereafter, biweekly. The Contractor should also expect to have regular contact with other NIAMS staff – particularly, on a daily basis, with the staff of the OCPL – in carrying out such tasks as inquiry response, materials development, and event planning. Decisions and approvals are to be made by the Project Officer, unless otherwise clearly delegated.

B. The Contractor shall establish individual e-mail addresses for all assigned Contractor staff. At a minimum, the Contractor's Project Director, the Information Specialists, the Librarian/Technical Information Specialist, and the Writers must have Internet access to search, read, retrieve, and print information from Internet sources.

4.2.2 Annual Performance and Operating Plan

A. The Contractor shall draft an Annual Performance and Operating Plan that covers each service area of the contract. This Plan shall provide sufficient detail on technical content, schedule, and cost management to allow the Government to confidently and accurately monitor Contractor progress toward accomplishing the objectives stated in this Statement of Work. The Annual Performance and Operating Plan will address accomplishing the requirements of the contract and focus on customer satisfaction, quality, timeliness, and cost-control.

B. The first Annual Performance and Operating Plan shall be largely based on the Contractor's award proposal; this Plan shall be due within 1 month of contract award. The Contractor shall submit subsequent plans each year on the anniversary date of the contract award.

4.2.3 Messenger Services

Beginning 3 days after contract award, the Contractor shall provide messenger service as follows:

- 1) At least once per day (at a regular time approved by the Project Officer), between all of the Contractor's facilities used for this contract and the OCPL office at NIAMS, Building 31/Room 4C02, Bethesda, MD.
- 2) At least once per day deliver packages and letters for mailing from the NIH mail facility and pick up Clearinghouse mail. The Clearinghouse permanent address shall be the NIH mail facility (301 N. Stone Street, Rockville, MD) and shall be designated as 1 AMS Circle, Bethesda, MD 20892-3675.

- 3) Approximately four times per month (as approved by the Project Officer) messenger service shall be available for special runs as approved by the Project Officer. Special runs will include pick up or delivery at other NIH offices, and other locations in the Washington, DC metropolitan area. In an emergency situation (as determined by the Project Officer), the Contractor must be able to pick up or deliver material within 2 hours.
- 4) These pickups or deliveries may include correspondence, reports, exhibits, and boxes of the same weight and size as those that hold copier paper.

| <u>Performance Measure</u> | <u>Performance Standard</u> |
|---|--|
| a) Overall Project Management: <ol style="list-style-type: none"> i. Contractor maintains proactive control over all assignments and notifies the PO and CO immediately with problems. ii. The Annual Performance and Operating Plan plan is timely, detailed, and comprehensive. | a-i) PO, CO, and/or CS are not required to address operational problems (due to lack of communications or prior planning by the Contractor) more than once in a 3-month period. a-ii) The Annual Performance and Operating Plan is developed in consultation with OCPL Staff, and minor revisions are expected. However, less than 10 % revision of the final draft is expected to involve substantive changes. |
| b) Adequacy of Messenger Service | b) Project Officer receives no complaints about missed deliveries; no more than one late delivery per month; and no complaints about courtesy. |

4.3 Service Area -- Information Operations

A. Performance Objective No. 4.3 *The Contractor shall operate the Clearinghouse in a manner that provides a high level of customer satisfaction with quality, accuracy, thoroughness, helpfulness, and timeliness of information on topic areas within the NIAMS mission. Information Operations includes providing timely, usable, and appropriately tailored responses to customer inquiries; development of appropriate and targeted materials for both lay and medical-professional customers (to include low-literacy and language-translated materials); management of materials to ensure proper control, inventory levels, and timely and accurate distribution of materials; and management of relevant database(s) to ensure data repositories are maintained with appropriate currency, indexing, abstracting, and search capability. (See paragraphs 4.3.1 through 4.3.4, below.)*

B. General Operations/Responses

- 1) Contractor personnel shall be available to respond to inquiries during the Clearinghouse's previously stated operating hours. The Clearinghouse phones shall be equipped and staffed sufficiently so callers do not wait beyond four rings or wait on hold for more than 1 minute. For the remainder of the 24-hour period, the voice-messaging system shall take calls and record messages.
- 2) As inquiries are handled, the Contractor shall identify, to the greatest extent possible, topics that could be addressed by developing standard information packages, publications, fact sheets, or form letters; the Contractor shall recommend the development of these at through the monthly report.
- 3) The Contractor shall establish and maintain an e-mail address exclusively for inquiries to the NIAMS Information Clearinghouse; it is subject to approval by the Project Officer.
- 4) Congressional and press inquiries that are received by the Clearinghouse must be referred to the Project Officer within 1 hour of receipt. Gifts and donations to the NIAMS received by the Clearinghouse must be referred to the Project Officer within 1 workday of receipt.

C. Telephone Inquiries

- 1) By Month 3 the majority of resources shall be established and available, so that most telephone inquiries shall be answered at the time of the initial call. If additional information is needed (e.g., a computer search), the Contractor shall return the call as soon as the information is obtained, ideally, within 5 working days.
- 2) Printed materials requested by phone shall be sent out within 3 working days of their request; phone inquiries that require a custom response but not a customized letter (e.g., those requiring special research) shall be sent out within 5 working days of the inquiry; phone inquiries that require a custom response with a customized letter shall be handled as described in the second bullet point under "Written Inquiries" below.

D. Written Inquiries – include fax, e-mail, and mail inquiries

- 1) The Contractor shall send out standard replies to written inquiries within 3 working days of receipt.
- 2) The Contractor shall be responsible for producing custom letters in draft and final form, assembling relevant materials, obtaining Project Officer review and approval, and mailing replies along with any relevant publications. Draft response for custom letters shall be submitted to the Project Officer within 5 working days of receipt of inquiry. Revisions to any drafts shall be completed within 1 day of return receipt of final draft.
- 3) The Contractor shall maintain a file of all custom letters, including the incoming letter, the response, and the data control form.

- 4) OCPL staff shall be provided electronic access to custom letters. The electronic filing system is to be agreed upon by the Project Officer and Contractor, and the system shall be established within 30 days of contract award.
- 5) Inquiries received by fax shall be acknowledged by return fax within 1 workday of receipt (it is acceptable to acknowledge fax inquiries in a standardized way approved by the Project Officer). The timeframe for a full response shall be the same as cited above for other written inquiries. Full responses to fax inquiries may be handled by fax or other means as appropriate. The Contractor shall accommodate requests for response by facsimile within page limits set by the Project Officer.
- 6) E-mail inquiries shall be acknowledged within 1 workday of receipt (it is acceptable to acknowledge electronic inquiries by an automatic means approved by the Project Officer). The timeframe for a full response shall be the same as cited above for other written inquiries. Response to e-mail inquiries may be handled by e-mail (preferred) or by other means as appropriate.

4.3.1 Materials Development

A. Planning, Clearances, and Management

Contractor staff will participate in developing the NIAMS Publications Plan every 2 years. This plan outlines specific publishing priorities, taking into account such factors as: audience needs and interests; the state of the science; existing materials produced by other organizations; and other criteria. The plan makes recommendations for publications to be created, revised, and discontinued. The plan also addresses translating materials into Spanish or creating new Spanish-language or bilingual materials, and creating “low-literacy” or easy-to-read materials.

B. Plain Language

A Government-wide directive requires Federal agencies to use plain language in all documents written for the public. The Contractor shall develop materials using grammatically correct language with complete sentence structure and accurate word usage. Materials should convey clear meaning without unnecessary words or expressions.

C. Pretesting of Materials

Some materials, particularly the *Handouts on Health* series, may require audience pretesting to ensure that information is transmitted to the target audience in an understandable and culturally sensitive manner. The Contractor shall facilitate such pretesting, including the development and application of test instruments, facilitation of focus group discussions, the gathering and interpretation of data, and the recommendation of any necessary action.

D. Publication Processes

For each proposed new and revised publication that is approved by the Project Officer, the Contractor shall:

- 1) Develop an estimate of labor hours and costs, a step-by-step project plan, and/or a timeline that includes clearance by the Project Officer.
- 2) When requested, draft a narrative justification, specifications, and cost estimates in order to assist the Project Officer in obtaining publications approval from the Office of the Assistant Secretary for Public Affairs (OASPA), DHHS.
- 3) Maintain a current record of the materials being created or revised under this contract, including the individuals assigned to specific writing, editing, and production projects, the date of the current version (if any), the inventory number, and, for documents underway, the current status, and next steps with due dates. This list should be in an electronic format accessible to both Clearinghouse contract staff and OCPL staff, and it also should be provided in hard copy with the monthly report.
- 4) Maintain all master files of all publications and information packages and of original writing in hard copy format (including camera-ready if it has been designed), ensuring that all changes and revisions have been incorporated in the master. For original writing, the Contractor shall also provide the Project Officer with electronic formats compatible with NIAMS IT systems.

E. Information Dissemination

The Contractor shall disseminate materials and information as requested by the Project Officer, to include converting into Web-accessible formats – in compliance with Technology Accessibility Standards (["Electronic and Information Technology Accessibility Standards"](#)) – the following:

- 1) Text of documents. The Contractor shall convert documents into Web-ready format within 1 week of request, with exceptions for longer or shorter timeframes made by the Project Officer.
- 2) Images, audio, or video. The Contractor shall prepare such documents for Internet access, including scanning of letterheads and other images.

F. Clearinghouse Materials

The Contractor shall create printed, electronic, and display materials that describe and promote the Clearinghouse, including: a flyer or brief brochure (2 to 6 manuscript pages) about the Clearinghouse that shall be created within 3 months of contract award and updated annually or as necessary; announcements and other materials that

describe new publications and services by the Clearinghouse; and exhibits as described under subtask 4.3.

G. Information Packages

1) The Contractor shall create and update information packages, which are used to respond to common inquiry topics on which NIAMS does not have original material. Each package is approximately 40 pages long and includes a cover page, an annotated list of additional information sources, current lay and technical articles, and, if applicable, news releases, lists of NIAMS-supported research centers, a fact sheet, and/or a list of key words and their definitions.

2) As assigned by the Project Officer, the Contractor shall be responsible for requesting and obtaining permission to reproduce and distribute copyrighted articles from the copyright holder and the Contractor shall maintain files of these responses. When permission is granted, the Contractor shall use the article and shall comply with requirements imposed by the publishers (e.g., special wording on the article); unusual requirements shall be brought to the attention of the Project Officer

[NOTE TO OFFERORS: No costs should be budgeted for fees associated with obtaining copyright permission; most publishers granting permission have waived fees.]

3) The Contractor shall create new information packages as approved by the Project Officer and assist in updating the existing ones, using literature searches to identify articles. The Contractor shall keep cover and source information of all packages up-to-date.

[NOTE TO OFFERORS: The Clearinghouse currently maintains approximately 30 information packages on commonly requested topics. These packages are revised every 3 years.]

H. *Question and Answers About...* Series and Key Word Lists

The Contractor shall:

- 1) Assist in revising booklets (e.g. editing), particularly those in the series entitled *Questions and Answers About...(Q/As)*. The Contractor shall also create and revise key word lists as appropriate, which provide lay definitions for words in the Q/As. The Q/As shall be written and designed so they can stand alone, be easily revised, be adapted for the Web, and be reproduced in large quantities.
- 2) Assist in updating Q/As with a style, tone, literacy-level, depth, and accuracy consistent with current versions. The Contractor shall expect to assist in revising a given Q/A every 3 years.

- 3) The Contractor shall keep an electronic version of a master list of approved key words for easy access and to ensure consistency.

[NOTE TO OFFERORS: There are currently 26 Q/As in final format. Estimated requirements are for approximately 2 new and 13 revised Q/As per year.]

I. Handout on Health Series

The Contractor shall:

- 1) Assist in revising booklets in the *Handout on Health* series, which are meant to provide in-depth information about key disease topics within the NIAMS mission. The primary audience is generally patients and their families.
- 2) Assist in updating in a style, tone, literacy-level, depth, and accuracy consistent with existing *Handouts*. Facilitate pretesting as appropriate.
- 3) The Contractor shall use communications research methodology in the development of specific products, including the Handout on Health series.

[NOTE TO OFFERORS: Estimated annual requirements are approximately 1 to 2 new *Handouts*, and 3 revised *Handouts*. The Contractor shall expect to assist in the revision of a given *Handout* approximately 2 years since it was created or last revised.]

J. Low-Literacy Products

- 1) The contractor will assist in creating or revising low-literacy publications.
- 2) The Contractor shall use communications research methodology in the development of low-literacy products.

[NOTE TO OFFERORS: Estimated requirements are approximately 1 to 2, new low-literacy products per year.]

K. Writing About Research Results

The Contractor shall be able to write effectively about the results of biomedical research for a lay audience in a variety of formats, such as news releases on single findings, “backgrounders” for news releases (which provide additional in-depth information relevant to the topic), research briefings (less than a page each), and announcements of research initiatives, feature articles, and reports or overviews of a research field.

L. Development of Other Materials

1) The Contractor may be requested to create a variety of other materials not specified already, such as documents that describe the NIAMS and its programs; standardized CHID searches; handouts for special events (ranging from health fairs to scientific meetings); conference-related materials (such as summary minutes); directories; special brochures on the joints, skin, muscles, and bone; or possibly materials for children or adolescents.

[NOTE TO OFFERORS: Estimated annual requirements are approximately 3 to 5 writing projects.]

2) The Contractor shall provide a full range of editorial services for the writing projects required in this contract, as well as for additional editorial projects as requested by the Project Officer. Prior to undertaking editing projects, the Contractor shall obtain the Project Officer’s agreement on the editing requirement. If requested, the Contractor also shall provide a cost and labor-hour estimate for editing projects.

[NOTE TO OFFERORS: In addition to the range of other required writing and editing tasks described elsewhere in this task, estimated additional annual editorial requirements are copyediting for 9 Q/As produced by OCPL staff.]

M. Spanish Language, Other Language, and Bilingual Materials

The Contractor shall:

- 1) Develop new Spanish or other language or bilingual materials or translate selected health information materials into Spanish or other languages. Clearinghouse customers are mainly English or Spanish speakers with a variety of different education levels. The Project Officer will specify the language and education level of target audiences when requesting development and/or translation of bilingual materials. It is imperative that the Contractor expresses information in a way that is appropriate for the particular culture being addressed.

- 2) In the event consensus cannot be reached as to what word or term should be used in the development/translation of bilingual materials, the United Nations Standard for the word/term in question will be used.
- 3) The Contractor shall provide proofreading and pretesting of translations when requested by the Project Officer.

[NOTE TO OFFERORS: “Other Languages” are undefined at this time. Based on current experience, it is anticipated that the next audience to be targeted will be the Asian population.]

N. Graphic Design, Production, and Reproduction Services

The Contractor shall provide design, illustration, typography, layout, production, and duplication services for the tasks described in this contract. Annual requirements include, but are not limited to, the following:

- 1) Reproduction (and mailing) of news releases and announcements on either preprinted letterhead or letterhead that is already part of the document.

[NOTE TO OFFERORS: Estimated annual needs are approximately 15 jobs, each involving copying 3 pages for mailing to 1,200 addressees.]

- 2) Design, production, and duplication of Clearinghouse materials.
- 3) Reproduction of information packages, Q/As, and large-print Q/As on an as-needed basis, keeping a 1- to 3-month supply for quick-turnaround requests. Preprinted letterheads exist for information packets.
- 4) Design, layout and production of Q/A series and the *Handout on Health* series created under this contract.
- 5) Formatting of Q/A and other materials in large print.
- 6) Design, production, and reproduction of low-literacy materials.
- 7) Design of the Clearinghouse Web site (part of the NIAMS Web site).
- 8) Conversion of text and graphics of materials created or edited in subtask 4.3.2 for placement on the Clearinghouse Web site (part of the NIAMS Web site).
- 9) Design, production, and reproduction of materials related to the annual and ongoing promotion of the Clearinghouse.
- 10) Design, production, and reproduction for publicity for NIAMS conferences, including registration flyers and small and large posters.

[NOTE TO OFFEROR: Estimated annual requirements are one flyer and one rolodex card (5,000 copies each) for exhibit handouts, and a bookmark (one in English and one in Spanish) for mailings (10,000 copies).]

[NOTE TO OFFERORS: Estimated needs are for two conferences a year, each needing 5,000 registration flyers, 500 invitations, and 5 signs.]

O. Management of Printing

The Contractor shall oversee the printing requirements of this effort as follows:

- 1) Prepare materials according to the specifications provided by the Project Officer for each job. Specifications will include type of paper stock, ink, print parameters, a timeline for review, and delivery of the project.
- 2) Make suggestions to Project Officer for improving quality or cost effectiveness, as appropriate.
- 3) Thoroughly review bluelines. Bluelines are promptly returned to printer after approval by the Project Officer.
- 4) Ensure color is properly reproduced and the final product is free of errors and distracting marks and errors.
- 5) Deliver high-quality, printed materials in the proper quantities, within the timeframes specified.

[NOTE TO OFFEROR: The Uniform Budget Assumption for printing requirements for year 1 of this contract is \$50,000 with an annual increase of \$4,000 per year for the remaining contract years.]

P. Other Requirements

- 1) Other requirements include:
 - a. Design and production of signage
 - b. Photo and graphic research to identify illustrations for NIAMS materials
 - c. Publicity materials for special events
 - d. Medical graphics for Q/A booklets, *Handouts on Health*, and other materials in subtask 4.3.2.

[NOTE TO OFFERORS: Estimated requirements for medical illustrations are approximately 5 per year and approximately 12 other graphics/illustrations per year.]

2) The Contractor shall make available the services of several experts in graphic design and illustration so that the Project Officer has a choice of styles. The Project Officer must approve initiation of design work and printing parameters (such as numbers of colors) before the Contractor begins a project. Design work must be approved by the Project Officer before final copy and disks are prepared.

4.3.2 Materials Management

The Contractor shall receive, store, distribute, and maintain an inventory of publications and materials, including camera-ready artwork, negatives, exhibits, etc., that are the property of the NIAMS.

The Materials Management subtask shall include:

A. Storage

Provide adequate safe, secure, and dry storage of NIAMS materials. Such storage shall be sufficiently accessible and physically configured to allow for timely, accurate, and efficient receipt, stowage, retrieval, and processing for distribution/delivery of all materials required under this contract.

B. Receipt

- 1) Receive, verify, and store bulk shipments of publications.
- 2) Receipt constitutes checking the identity, quantity, and quality of each shipment upon receipt; notification of the Project Officer on the day of receipt or the morning of the next working day of the quantity, arrival date, problems, and any other useful information; and sending 10 copies of the new document to the Project Officer.

[NOTE TO OFFERORS: There will be an estimated 20 incoming shipments per year, ranging from 1,000 to 75,000 copies of a given document.]

C. Distribution

- 1) Fill both bulk and individual publications orders within 3 days of receiving requests via the NIH mail facility.
- 2) Occasionally (1 to 3 times per year) fill bulk publication requests and deliver publications to the local Washington metro area within 2 hours of receiving request.
- 3) Express mail shall be approved by the Project Officer in advance or, if the recipient has provided their express mail billing account.
- 4) As requested, coordinate and execute mailings of new publications, news stories, announcements, conference registration information, or other materials. Such mailings must be completed in 3 working days and sent from the NIH mail facility. The Government will either provide envelopes or set the material up as a self-mailer.

D. Inventory Management

1. Maintain an electronic inventory of NIAMS materials so that accurate, up-to-date information is available at all times. The tracking system shall be operational within 3 months of contract award.
- 2) A monthly report of inventory shall be prepared and must include for each publication or other material the following: the opening monthly inventory, quantity added and quantity distributed in the past month, closing monthly inventory, cumulative distribution to date, and average monthly quantity distributed since the publication was added to the inventory.
- 3) An early notification system shall be implemented that alerts both the Contractor's Project Director and the Project Officer when the supply of a given publication is low, particularly for those that require offset printing (for which a 6-month supply should trigger notification).

E. Data-Collection, Tracking, and Reporting System

- 1) Utilize a computerized system that connects and tracks written, phone, fax, and e-mail inquiries, publications orders, and the publications inventory. This system shall be developed by the Clearinghouse so that all Clearinghouse Contractor personnel and OCPL staff involved in handling inquiries, filling orders, or creating publications can use it via their individual computers to log in and track inquiries. The data system shall allow direct input of inquiry information by an Information Specialist onto a computer without having to transfer from a handwritten inquiry sheet. The Contractor shall provide a control

“sheet” in print and electronic form to use for each inquiry and develop it so that it can be used by both Clearinghouse staff and OCPL staff.

- 2) The Contractor shall track the following customer inquiry and response data: nature and type of request, mode of receipt, amount of screening time necessary, type of response, number of publications distributed, type of referral, number of searches required, amount of response time required, type of user, setting of user, how the user heard of the Clearinghouse (including any promotions), disease subject addressed, and publication(s) used to respond to the request. The tracking system shall be operational within 3 months of contract award.
- 3) The Contractor shall periodically identify methods to handle this service area more cost effectively and provide recommendations to the Project Officer via the monthly report.
- 4) The Contractor shall begin to fill customer orders for informational materials within 2 weeks after contract award and shall respond to more detailed inquiries that require more than a publication or other standard material (e.g., tailored or unique response) within 4 weeks after contract award. Exceptions include letters and calls from members of Congress and the media, which will require an expedited response by the OCPL. The Contractor shall bring these latter inquiries to the immediate attention of the Project Officer who shall assign priority and response due dates.

4.3.3 Database Management

The Contractor shall carry out several responsibilities related to the use and maintenance of databases. These responsibilities include:

A. Maintenance of the Arthritis and Musculoskeletal and Skin Diseases (AR) Subfile of CHID

- 1) The Combined Health Information Database (CHID) is a consolidated database of subfiles provided by a consortium of Federal health information and education programs. Currently, CHID is interfaced with BRS NetAnswer for compatibility with the World Wide Web. The NIAMS Information Clearinghouse participates in CHID through maintenance of the Arthritis and Musculoskeletal and Skin Diseases subfile (the AR subfile). The AR subfile helps Clearinghouse staff know what materials other organizations are producing about arthritis and musculoskeletal and skin diseases, and it assists them with in-house research for inquiries and for creating new materials. The CHID database is also gaining popularity as an Internet resource for the public.
- 2) The Contractor shall continue to maintain the AR collection of hardcopy materials and update and revise database entries in the AR subfile, periodically purging outdated materials from its holdings and entries as approved by the Project Officer.

The Contractor shall maintain a computerized version of the AR subfile for immediate access to respond to inquiries and for research purposes.

3) The Contractor shall pay the AR share of administrative costs. The Project Officer shall approve the invoice for these fees before the Contractor pays them. The Contractor is billed annually for these fees, with a per record charge for each subfile based on the midyear number of records.

4) The Contractor shall provide recommendations regarding the usefulness of and possible changes in the AR subfile of CHID as part of the Annual Performance and Operating Plan.

[NOTE TO OFFERORS: The AR subfile of CHID contains approximately 2,700 records. The URL for CHID is <http://chid.nih.gov/> and for the AR subfile it is <http://chid.nih.gov/subfile/contribs/ar.html>. The Uniform Budget Assumption for the annual administrative charge for the AR subfile is \$1,000.]

B. Identification, Acquisition, and Screening

In order to build and maintain the AR subfile of CHID and stay current on new materials and information in NIAMS topic areas, the Contractor shall identify, screen, and continuously monitor likely sources of public, patient, and health professional material related to the topics covered by the Clearinghouse. One copy of these materials to be added to CHID or used as a reference— including brochures, booklets, newsletters, videotapes, review articles, reports, directories, posters, and teaching aids—shall be acquired. These materials, as well as journals and appropriate reference materials used for the contract, shall be cataloged or classified for easy access for Clearinghouse contract and NIAMS staff. The Contractor shall make every effort to obtain these materials at no cost. In addition, the Contractor shall ensure that duplicate records are not added to the database.

C. Abstracting and Indexing

1) The Contractor shall create bibliographic records, including abstracts and index terms, of all acquired documents to be added to the AR subfile. Abstracts shall provide potential users of the document with an abbreviated, objective version of the contents that enables users to decide whether or not a full-text version of the document would be of value. Index (i.e., search) terms shall be those listed in the NIAMS Information Clearinghouse thesaurus described below.

2) The Contractor must format each bibliographic record according to CHID specifications for entry into the BRS system for CHID. The tapes shall be updated quarterly (January, April, July, and October of each year) and an error-free version provided via ftp (file transfer protocol) to the CHID online coordinator through the CHID consortium in error-free condition. The Contractor shall add approximately 100 items to the AR subfile each quarter, with an emphasis (70% or more) on

materials not already listed on Medline (Medline is the National Library of Medicine database of citations and abstracts for over 9 million articles in some 3,900 biomedical journals). A thesaurus of index terms and a search reference guide shall be maintained as needed and available for purchase by users of the subfile if necessary as determined by the Project Officer.

D. Establishing, Updating, and Maintaining Mailing Lists

1) The Contractor shall maintain and update computerized mailing lists, creating new mailing lists as requested by the Project Officer or as needed. Lists and/or pressure-sensitive labels shall be made available for the exclusive use of NIAMS and shall be provided to the Project Officer within 24 hours of request. The Contractor shall maintain mailing lists on a database that permits sorting and merging by identifier codes and permits printing labels, rosters, and mail merge letters. Mailing lists are the property of NIAMS and shall not be used by the Contractor for other purposes.

2) The mailing list database shall be maintained in electronic format that can be readily used by NIAMS and transferred to the next Contractor. The software should also have the capacity to keep additional information on a given individual – such as phone, fax, e-mail address, and so forth – and still enable the printing of address labels. The Contractor shall set up the mailing list database to be accessible to the Project Officer and other NIAMS staff as he or she designates.

3) The Contractor shall update mailing lists on a continuing basis, with changes made within 1 week of request. Every 2 years, by the start of Contract Years 2 and 4, the Contractor shall verify the accuracy of the mailing lists. The Project Officer will make exceptions to this policy for some lists, which shall be revised and updated annually. (At least 3 of these lists totaling about 950 names shall be updated annually.)

[NOTE TO OFFERORS: Estimated annual requirements are 25 requests for different sets of labels and 10 requests for rosters of 22 to 600 names. There are approximately 15 mailing lists with a total of approximately 1,500 addresses; these lists include media, organizations involved in NIAMS topics, members of the advisory council, and others. Offerors should describe in detail their approach to fulfilling mailing list requirements given above.]

E. Coalition Directory System (CDS)

The Contractor shall maintain and update the NIAMS Coalition Directory System (CDS), a database that contains data features to allow the NIAMS to easily maintain a list of its contacts and communicate with colleagues and organizations that comprise the NIAMS Coalition. The system uses Microsoft Access 2000 database software with a fully functional remote interface to the system on the World Wide Web. The system allows the user to browse and update contact information; search for contacts by name, organization, contact type, and email address; add, browse, and update

organizations; create a CDS Directory Listing sorted by organization; create roster reports; send e-mail blasts; create mailing labels; and run mail merges.

F. Special Searches/News Services

1) The Contractor shall conduct special information searches for NIAMS staff as requested and approved by the Project Officer and shall have access to the Internet, the National Library of Medicine databases, online news clipping services (including Nexis), and other databases.

[NOTE TO OFFERORS: Estimated requirements are 5 searches per year.]

2) The Contractor shall also make use of at least one newspaper or online news clipping service and use them to track usage of NIAMS news releases and to obtain copies of key newspaper and magazine stories on its topics. The clips provided should indicate the source and its circulation. The Project Officer shall provide the criteria for clips provided. This service shall be in place within 6 months of contract award. The Contractor shall organize the clips in subject-matter order and provide one legible (suitable for photocopying) hardcopy of each to the Project Officer on a monthly basis.

[NOTE TO OFFERORS: The intent is to be able to keep track of major coverage of NIAMS topics and of the usage of news generated by the NIAMS. A few well-chosen clips – on an estimated scale of 10 or fewer a month – are expected.]

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|---|---|
| a) Congressional and press inquiries, and gifts/donations are referred to the Project Officer within the timelines outlined in the Statement of Work. | a) 100% of Congressional and press inquiries, and gifts/donations are referred to the Project Officer within the timelines outlined in the Statement of Work. |
| b) Information operations are run smoothly and effectively on a day-to-day basis. | b) 98% of the time, the dedicated voice mail and e-mail systems are fully operational as described in the Statement of Work. |
| c) Inquiry responses are timely. | c) 95% of inquiry responses are provided to the customer within timelines provided in the Statement of Work. |

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|---|--|
| d) The Contractor provides high-quality management, research, writing, editing, designing, and/or production of NIAMS health information or scientific materials. | d) Less than 5% of materials are returned to the Contractor for revision to correct: <ul style="list-style-type: none"> • A significant amount of scientific/technical content because of inaccuracies or currency of information. • Overall inappropriate tone, language, or terminology. |
| e) Printing requirements and specifications are followed. Any substitutions are discussed with the Project Officer before printing is executed. Color is properly reproduced and final product is free from distracting marks. Quality of printed products meets minimums specified in the Statement of Work. Printing specifications are checked and suggestions for improving quality or cost effectiveness are offered as appropriate. | e) Less than 5% of materials are rejected due to noncompliance with printing requirements and specifications. |
| f) Blueline markups are thoroughly checked, marked, and offered to NIAMS for approval. Bluelines are returned to the printer promptly. | f) Less than 5% of materials are returned to the Contractor with significant corrections. |
| g) Printed materials are delivered to proper recipients in the quantity, quality and timeline specified. | g) 95% of deliveries of printed materials are received in the quantity, quality and timeline specified. |
| h) When requested, illustrations are original and unique to the NIAMS. | h) 100% of such illustrations are original artwork. |
| i) Materials are received, stored, inventoried, monitored, and distributed in a timely and cost effective manner. | i) Materials are available in sufficient quantities for timely distribution to meet NIAMS requirements 90% of the time. |

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|--|--|
| j) Databases are developed and maintained to provide access to references and support a number of Clearinghouse functions. Accuracy and the appropriate classification of data ensures timely, accurate, and quality queries/searches. | j-i) 95% of materials reflect current and/or relevant data. j-ii) 95% of queries/searches yield high-quality data, as evidenced by searches conducted by subject-matter experts and others. |

4.4 Service Area -- Outreach and Promotion of NIAMS Clearinghouse and Related Services

A. Performance Objective No. 4.4 *The Contractor shall provide outreach and promotion services that substantially contribute to an increase in public and medical/professional awareness of the NIAMS Information Clearinghouse and related services.*

B. To help promote the Clearinghouse and to encourage collaboration and avoid duplication, the Contractor shall work closely with the Project Officer to become familiar with the educational efforts of groups and organizations in fields related to those of the NIAMS Information Clearinghouse and to involve these groups, where feasible, in collaborating on the development of plans, products, and services. The Contractor shall consider the efforts of these groups – specifically what their information and education products and services are – in carrying out various Clearinghouse tasks, such as inquiry response and materials development, and shall electronically catalog the products and services of these groups for reference by the Contractor and NIAMS staff.

[NOTE TO OFFERORS: Offerors should describe in detail how they would achieve these goals.]

C. Promotion Plan

1) The Contractor shall develop an annual Clearinghouse promotion plan that identifies key audiences, describes ways to reach them, maximizes services for and information dissemination to these audiences, while keeping costs down for both the promotion and the resulting response.

2) The Contractor shall regularly promote the Clearinghouse, as well as conduct an annual promotion of products and services. Promotion strategies shall include:

- a. Developing materials, such as descriptions and updates; exhibiting at key meetings; and involving related organizations. Plans for all such activities shall be included in the annual promotion plan.
- b. The first promotion plan shall be based on the proposal and is due within 3 months of contract award. Subsequent promotion plans are due with the Annual Performance and Operation plan (see 4.2.2).

D. Materials Promotion

In the course of developing the materials required under subtask 4.3.2, the Contractor shall develop a specific promotion plan and distribution plan for each item, including individual handouts, low-literacy documents, and Spanish-language documents. Also included in the promotion plan shall be estimates for printing (e.g., quantities) to assist with inventory management and workload.

4.4.1 Event Support

The Contractor shall support selected NIAMS-organized events; these will address scientific or public health issues related to research, education, treatment, diagnosis, or prevention. The services required will vary depending on the nature of the event and the amount of involvement by NIAMS staff. The Contractor shall provide event planning and management services, if requested by the Project Officer, as follows:

A. Pre-event Activities

Pre-event activities include development of an overall plan for the event with a timeline and budget to be approved in advance by the Project Officer; contacting speakers about logistics; preparing and distributing registration, program, and promotional materials; handling of pre-registration and logistic arrangements, including facilities, audiovisuals, reasonable accommodations for people with disabilities, and refreshments; arranging travel for speakers and other participants; and drafting of travel orders, vouchers, and/or professional services orders.

B. On-site Services

On-site services include staffing the registration desk; testing and operating audiovisual and other equipment; and documenting of discussions.

C. Postevent support

Postevent support includes preparing an event logistics report (due 10 days after the event), and writing a brief (3-5 pages) or longer (25-40 pages) summary of the contents of the event and recommendations made (due in 5 working days if brief and in 20 working days if longer) to be reviewed by the Project Officer and others and for potential publication by NIAMS in print and on the Web or in an appropriate journal.

[NOTE TO OFFERORS: Estimated annual requirements are the full support of one 250-person event at NIH as well as partial assistance with 3 other NIAMS-sponsored events per year. For purposes of this solicitation, in describing their approach to this task, offerors should describe how they would support an event at NIH on current and future information dissemination needs on NIAMS topics. The goal of the event would be to encourage cooperation among NIAMS

and related organizations, better define roles, and determine what the needs are for products and services. There would be 75 participants (most from outside of NIH), and the meeting would last 2 days, including 2 half-days of simultaneous breakout sessions each. Plenary sessions would include 6 speakers per half day. The Government will reimburse the speakers directly. The required event report would be a 25- to 50-page summary with recommendations to be published by NIAMS.]

D. Exhibit support

1) The Contractor shall support NIAMS exhibits; plans for these shall be included in the Annual Performance and Operation plan to include:

- a. Scheduling and arranging for exhibit space, paying exhibit and other fees (with an emphasis on obtaining free space), setting up and taking down the exhibit display and materials used at the exhibit (or arranging and paying for this service if necessary), and paying costs of Contractor staff travel for Clearinghouse-attended meetings and of transporting materials to and from each meeting.
- b. Staffing the NIAMS exhibits (when requested) with one person at each meeting.
- c. Exhibit displays and other exhibit materials shall be reviewed every year and updated if necessary. The display design should allow for flexibility in the panels so that different panels can be produced for varying audiences. The Contractor shall store, ship, inspect, and repair and refurbish these displays.

[NOTE TO OFFERORS: NIAMS currently has a tabletop display and a freestanding display that measures approximately 8 x 10 ft.]

[NOTE TO OFFERORS: Estimated requirements for this task are 51 NIAMS Information Clearinghouse exhibit showings per year (38 of these are local and the Contractor will be expected to provide 1 staff member for approximately 6 of the remaining showings). These meetings can be expected to be in major cities of the United States. Each event lasts about 3 days (inclusive of travel time). In preparing proposal estimates for travel, offerors should assume travel to Manhattan, Chicago, and San Diego for exhibit support.]

2) Within 2 weeks after the end of each exhibit, the Contractor shall provide the Project Officer with a summary report on the number and types of materials sent and returned, the number of participants at the conference, comments and problems, suggestions for future meetings, and all associated costs. For exhibits attended by NIAMS staff rather than Contractor staff, the Contractor shall prepare the summary report but will contact NIAMS staff members to obtain the requisite information. These post-meeting reports shall be included in the monthly report.

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|---|---|
| a) Contractor develops a promotion plan that maximizes services and dissemination of materials, and avoids duplicating efforts of other agencies and/or organizations. | a) Plan is comprehensive, takes into account the efforts/products of other groups, and includes innovative approaches to promoting and publicizing the NIAMS Information Clearinghouse. Plan requires less than 5% change by the Project Officer and/or designated reviewers. |
| b) Pre-, day of, and postevent support for NIAMS sponsored events is at a level that ensures event's success and elicits positive response. | b) 100% of designated groups are notified of event; graphics and other supporting materials are produced by designated deadlines; sufficient supporting materials are available; facility and audiovisual equipment and connections are arranged and tested in advance. 95% of event summaries are accurate and complete. |
| c) Schedule and arrangements for exhibit space and set-up and dismantling of exhibit ensure NIAMS events are ready when scheduled to start and are completed in a timely and controlled manner. | c) For 95% of the events specified, the display(s) and exhibit materials are shipped in a timely manner. If exhibit assembly is accomplished by Clearinghouse Contractor personnel, assembly shall be timely. Materials are arranged to provide the highest visibility, and the Contractor staff is knowledgeable, helpful, and professional when dealing with event participants/attendees. When accomplished by Contractor personnel, materials are efficiently and carefully packed and shipped before the event and after completion. |

4.5 Service Area -- Patient Liaison Services

A. Performance Objective 4.5 *The Contractor shall provide patient liaison services for the NAIMS Health Partnership Program that provide a high level of*

customer satisfaction in terms of convenience, helpfulness, and timeliness of these services.

B. Overview and Background About Patient Liaison Services

- 1) The National Institute of Arthritis and Musculoskeletal and Skin Diseases (NIAMS) is mandated to address health disparities in rheumatic, musculoskeletal, and skin diseases. In response to this mandate, the Institute has established the Health Partnership Program, a community-based health disparities research program based in Washington, DC. This program currently focuses on rheumatic diseases in the minority communities of the Washington, DC metropolitan area. Eventually, it will expand to include other diseases within the Institute's mission.
- 2) A major component of this program is the NIAMS Community Health Center. The Health Center currently provides services through its facility located at 3020 14th Street, N.W., Washington, DC. Two additional outreach facilities are planned in Washington, DC.
- 3) The NIAMS conducts a health disparities clinical research program through the Community Health Center by providing patient care and health information focused on rheumatic diseases. There are no residence or citizenship requirements for patients attending the Community Health Center. Anyone over the age of 18 with symptoms of rheumatic disease is eligible to attend the Community Health Center. Health information, including classes, are geared toward patients and their friends and family.
- 4) Patients receive screening and medical exams at the Community Health Center. For additional services such as x rays, physical therapy, and pharmacy, patients are sent to the NIH Warren Grant Magnuson Clinical Center located on the NIH campus in Bethesda, MD.
- 5) It is important to make the transition for patients from the Community Health Center to the NIH Clinical Center seamless and efficient. Therefore, the Institute offers a Patient Liaison Service that provides a patient liaison to accompany patients to their medical appointments in the NIH Warren Grant Magnuson Clinical Center. The transportation is provided by NIH using one of two methods: (1) patients are transported from the Community Health Center to the NIH Clinical Center by van through the NIH Clinical Center's transportation contract or (2) patients are given Metrorail cards to use the public transportation system.

C. Patient Liaison

The Contractor shall provide Patient Liaison (PL) services for patients of the NIAMS Community Health Center. The Contractor shall be responsible for recruitment, scheduling, coordination, supervision and all administrative tasks related to liaison staffing.

Contractor personnel shall meet the following requirements:

1. Customer Service

The PL staff shall provide excellent customer service to the patients, the Community Health Center staff, and the NIH Warren Grant Magnuson Clinical Center staff to promote a positive image for the NIH.

2. Qualifications

All PL staff hired to translate between Spanish and English shall be fluent in the English and Spanish languages for both written and oral communications. In the event a patient elects to utilize public transportation rather than the transportation provided by the NIAMS, PL staff shall possess a good working knowledge of the public transportation system servicing the Washington metropolitan area.

3. Conduct

Patient liaison staff members are subject to all policies of the Department of Health and Human Services, the NIH, and the NIAMS as identified in NIH Manual Issuance 1301, entitled "Conduct of Persons and Traffic at NIH." All PL staff members are to complete training as specified in the "NIH Patient Liaison Program Handbook" and are required to display NIH-issued identification in accordance with current Office of Research Services policy. All PL staff members are subject to the clause entitled "Patient Confidentiality" in SECTION I, of the resultant contract.

4. Affidavit

Patient liaison personnel shall execute an Affidavit of Confidentiality as a condition of employment.

[NOTE TO OFFERORS: The NIAMS will be providing shuttle service for patients and PL staff, free of charge, from the outreach facilities to the NIH Campus.]

[NOTE TO OFFERORS: Currently, between 4 and 6 patients visit the NIH Warren Grant Magnuson Clinical Center from the Community Health Center, per week. This number is expected to increase by 10% every 6 months. Patient appointments take place between 9:00 a.m. and 5:00 PM, Monday through Friday.]

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|--|---|
| a) Contractor provides high-quality patient liaison services to the Community Health Center and other NIAMS outreach facilities. | a) 100% of the time, PL staff members are punctual, attentive to patient needs and abilities, and ensure that patients arrive for scheduled appointments. |

4.6 Service Area -- Cost Recovery

A. Performance Objective 4.6 *The Contractor shall develop a feasible proposed Cost Recovery Plan that identifies opportunities, policy, procedures, and methods for the recovery of a portion of the costs for the reproduction, postage, handling, and processing of materials provided to users.*

B. Although a Clearinghouse cost recovery plan is not currently in use, it is anticipated that during the period of performance of this contract, it may become necessary to recover some of these costs. In the event that the NIAMS determines that such cost recovery is necessary, the Contractor shall:

- 1) Establish a system for recovery of the costs of reproduction, postage, handling, and processing of Information Clearinghouse materials. Development costs shall not be included in the determination of charges.
- 2) Assist the Project Officer in formulating appropriate fees.
- 3) Establish a separate account for and maintain a record of all user charges and collections, using the fees to offset the costs of the contract. The Contractor shall account separately for cost recovery in each monthly report, indicating the amount received for each publication.

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|---|---|
| a) Contractor's Cost Recovery Plan provides realistic and implementable approaches to recovering selected costs for identified NIAMS products to offset postage and handling costs. | a) Cost Recovery Plan is detailed, considers all appropriate risk, and observes regulatory requirements for collecting fees and applying them against the cost of the contract. Plan is feasible even if not implemented. |

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|--|--|
| b) If Plan is implemented, percentage of costs recovered will be measured. | b) Contractor is able to recover sufficient funds to offset *TBN% of the handling and postage fees of NIAMS products. *TBN - To Be Negotiated |

4.7 Service Area --Transition Plan and Contract Close Out

A. Performance Objective 4.7 *The Contractor shall accomplish a smooth, efficient, and orderly transition for the contract work at both the start and end of the contract. This shall require the Contractor to develop a Transition Plan for (1) the assumption of the Information Clearinghouse contract work and (2) for the closeout of the contract upon completion of the contract effort and transition to any successor Contractor. The transition period at each end of the contract shall be 1 month.*

B. Transition and Startup

NIAMS requires that there be no disruption to services to be continued under this proposed contract. Among the details that must be addressed in the Transition Plan are transfer of all stored publications and materials from the incumbent Contractor; transfer and installation of any equipment; staff training and orientation; transfer of all reference material, the Clearinghouse documents collection, correspondence files, and shelf supplies of publications used to respond to inquiries; transfer of mailing lists; notification to NIAMS staff and Clearinghouse users of changes in phone, TTY, and fax numbers; transfer of the AR subfile of CHID; and transfer of program files, disks, and data developed during the contract period. The successor Contractor shall provide the Project Officer a list of all the steps and materials needed to carry out the transition and phase-in the various requirements of the contract per the task descriptions given previously. The successor Contractor shall be responsible for transportation of materials and other costs required for the transition.

C. Contract Expiration

The Contractor shall perform the following activities at the time of contract expiration:

- 1) The Contractor shall cooperate fully with the successor Contractor.
- 2) The Contractor shall participate in meetings and telephone conversations with the Project Officer and the successor Contractor in which current procedures and activities are discussed in detail.
- 3) The Contractor shall deliver to the successor Contractor the following in accordance with the delivery schedule: all stored publications and materials; all Government-furnished

property; all reference material, the Clearinghouse documents collections, correspondence files, and shelf supplies of publications and materials used to respond to inquiries; program files; master and camera-ready copies of materials; electronic versions of documents developed under this contract; and Web-related files.

- 4) The Contractor shall also deliver to the successor Contractor all software programs and data developed or altered in the performance of this contract and for which contract funds were expended, including the computerized system for CHID and the inquiry tracking system. These shall be provided in an appropriate form, such as duplicate copies of magnetic tapes, dumps of programs, and dumps of sample records. The Contractor shall also provide full documentation pertaining to the programs.
- 5) The Contractor shall pack all items listed in this section in new boxes of uniform size, label each with a unique number and a general description, and deliver them along with copies of an inventory showing the contents of each box in accordance with the delivery schedule.

[NOTE TO OFFERORS: Transition plans addressing startup will be evaluated as stated in “Section M – Evaluation Factors for Award,” of the RFP.]

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|--|--|
| a) During initial contract turnover, new Contractor is able to smoothly transition existing NIAMS capabilities from prior Contractor and all materials are successfully transferred, inventoried, stored, and accounted for. | a) At the end of the first month under contract, 95% transfer of materials and inventories is accomplished, as shown on the status report. Status report also reflects 95% assumption of existing NIAMS support capabilities. |
| b) Contractor-developed plan for subsequent transition to a possible successor Contractor at the end of the contract adequately addresses all processes, materials, and inventories associated with NIAMS support for smooth, efficient, and conflict-free turnover. | b) Transition Plan provides for 100% of process, material, and inventories to be successfully transferred. Plan contains process to ensure successor Contractor is thoroughly briefed and trained to provide seamless continuation of NIAMS support. |

4.8 Reports

A. Performance Objective 4.8 The Contractor shall provide accurate, informative, and timely reports of performance under this contract to the Project Officer. These reports shall provide the Project Officer an accurate assessment of performance under the contract and shall enhance the Project Officer’s ability to ensure that the NIAMS Information Clearinghouse is providing high-quality and effective information and support to customers.

B. Monthly Progress Reports

By the 10th calendar day of the month, the Contractor shall submit a monthly progress report that provides a brief overview highlighting the most significant activities and describes the opportunities, problems, and/or difficulties that arose during the preceding calendar month, as well as proposed solutions, and/or steps taken to solve problems. The report shall include a description of the Contractor's accomplishments for that month broken down by service area. The monthly report shall contain publications activity and the inventory, inquiry statistics, and a cost-recovery report for the month (if appropriate). The first report shall cover the period consisting of the first full calendar month following the effective date of the contract and any fractional part of the initial month. A monthly report is not due when the annual report is due.

C. Monthly Cost Report

By the 10th calendar day of the month, the Contractor shall submit a report which includes an accounting of costs, giving hours and dollars for each task in each of the following categories: amounts budgeted; amounts expended during the past month; amounts expended year-to-date; percent of budget amount expended for that task; amounts remaining; and amounts expended for the previous year. If there are one or more subcontractors, the Contractor shall total the costs of each task contributed by the prime and subcontractor(s) during that particular month. The Contractor shall also provide an accounting of costs of conferences and major projects (over \$5,000) when they reach one-half of estimate costs (either hours or dollars, whichever occurs first) and when they are complete. If the halfway point in costs is reached relatively early, the Contractor shall address the reasons for this and suggest ways to modify the plans.

D. Annual Progress Report

By the 30th calendar day following the anniversary date of the contract, the Contractor shall submit an annual report that describes the significant activities and accomplishments that have occurred in the preceding contract year. It will contain an overview followed by sections reporting on each contract task. The report shall provide complete usage statistics for the preceding year as well as complete inventory reports for publications distributed. In the final section of the report, the Contractor shall analyze the Clearinghouse's activities over the year and recommend future directions. The annual report shall also include cumulative figures and trends from previous years. The annual progress report shall cover the period consisting of the previous 12 months.

E. Annual Performance and Operating Plan

The Contractor shall draft an Annual Performance and Operating Plan that covers each service area of the contract. This Plan shall provide sufficient detail on technical content, schedule, and cost management to allow the Government to confidently and accurately monitor Contractor progress toward accomplishing the objectives stated in the Statement of Work. The Annual Performance and Operating Plan will address accomplishing the requirements of the contract and focus on customer satisfaction, quality, timeliness, and cost-control. Also included should be the Promotion Plan, which identifies methods for maximizing NIAMS outreach and promotion

efforts (see Section 4.4 of this Statement of Work). This Plan shall be submitted each year on the anniversary date of the contract award.

F. First Annual Performance and Operating Plan

The First Annual Performance and Operating Plan shall be largely based on the proposal; the actual operating version of this Plan shall be due within 1 month of contract award and shall include the initial Promotion Plan.

G. Final Report

At the conclusion of the contract, the Contractor shall submit a final report that summarizes all the activities undertaken during the contract period. The Contractor shall review all significant activities and accomplishments during the entire contract period and include statistical summaries of all activities. A final report shall be submitted on or before the expiration date of the contract.

H. Special Reports

At the direction of the Project Officer, the Contractor shall prepare and submit reports that describe the activities of the NIAMS Clearinghouse or reports that cover particular aspects of the Clearinghouse. These reports may be required for activities such as presentations, speeches, or briefings.

[NOTE TO OFFERORS: Sample reports can be viewed by selecting the Web link “Sample reports as required by Statement of Work,” listed in Section 3: Applicable Documents of this Statement of Work.]

I. Submission of Reports

Copies of reports shall be submitted to the following addresses in the number of copies indicated:

| <u>Addresses:</u> | <u>Number of copies:</u> |
|---|--------------------------|
| Project Officer Office of Communications and Public Liaison National Institute of Arthritis and Musculoskeletal And Skin Diseases, NIH Building 31, Room 4C02 31 Center Drive, MSC 2350 Bethesda, MD 20892-2350 | 2 |
| Contracting Officer Contracts Management Branch, EP National Institute of Arthritis and Musculoskeletal | 1 |

And Skin Diseases, NIH
Building 45, Room 5AS13A
45 Center Drive, MSC 6500
Bethesda, MD 20892-6500

| <u>Performance Measures</u> | <u>Performance Standards</u> |
|---|---|
| a) Deliverables are in compliance with Articles C and F of the contract | a) No more than one (1) workday delay per 6-month period. |

5. Glossary

Arthritis and Musculoskeletal and Skin Diseases (AR) Subfile: A subfile of the Combined Health Information Database (CHID) database (defined below) maintained by the Clearinghouse for NIAMS. The AR subfile helps Clearinghouse staff know what materials other organizations are producing on arthritis and musculoskeletal and skin diseases, and it assists them with in-house research for inquiries and for creating new materials.

Combined Health Information Database (CHID): a consolidated database of subfiles provided by a consortium of Federal health information and education programs. Currently CHID is interfaced with BRS NetAnswer for compatibility with the World Wide Web.

Community Health Center (CHC): A major component of the Health Partnership Program (defined below) is the NIAMS Community Health Center. The Health Center is located at 3020 14th Street, N.W., Washington, DC

Contracting Officer (CO): The person with the authority to enter into, administer, and/or terminate contracts and make related determinations and findings. Contracting Officers function as agents of the Government.

Health Partnership Program (HPP): The National Institute of Arthritis and Musculoskeletal and Skin Diseases (NIAMS) is mandated to address health disparities in rheumatic, musculoskeletal, and skin diseases. In response to this mandate, the Institute has established the Health Partnership Program, a community-based health disparities research program based in Washington, DC. This program currently focuses on treating patients with rheumatic diseases in the minority communities of the Washington, DC metropolitan area. Eventually, it will expand to include other diseases within the Institute's mission.

Medline: The National Library of Medicine database of citations and abstracts for over 9 million articles in some 3,900 biomedical journals.

Patient Liaison (PL): A NIAMS Patient Liaison accompanies patients to their appointments at the NIH Clinical Center. In the Health Partnership Program (defined above), it is important to make the transition for patients from the Community Health Center to the NIH Warren Grant Magnuson Clinical Center seamless and efficient. Therefore, the Patient Liaison escorts patients to their medical appointments in the NIH Clinical Center.

Project Officer (PO): A representative of the program office who ensures the Contractor's compliance with all the contract clauses and applicable laws and reports any deviations to the Contracting Officer.